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REVOLUTION IN THE TEXTBOOK PUBLISHING INDUSTRY.

BY- FINN, JAMES D. AND OTHERS
NATIONAL EDUCATION ASSN., WASHINGTON, D.C.

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IN THIS PAPER, M. FRANK REDDING OF THE AMERICAN TEXTBOOK PUBLISHERS INSTITUTE DISCUSSED THE STATE OF RAPID TRANSITION IN THE TEXTBOOK INDUSTRY. INCLUDED IN THE PAPER ARE STATISTICS SUPPLIED BY ROGER SMITH OF "PUBLISHERS' WEEKLY" CONCERNING TEXTBOOK SALES AND MERGERS OF BOOK PUBLISHING COMPANIES. THE NEED WAS STRESSED FOR A REAFFIRMATION OF THE PLACE OF THE BOOK IN TEACHING, AS WELL AS PROPOSALS FROM THE SCHOOLS TO PUBLISHERS WHICH WILL SHAPE PATTERNS OF FUTURE TEXTBOOKS. (JC)

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by

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with additional material by

Roger H. Smith

TDP —— NEA —— USOE

National Education Association

—TECHNOLOGICAL DEVELOPMENT PROJECT

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Occasional Paper No. 9

REVOLUTION IN THE TEXTBOOK PUBLISHING INDUSTRY

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A Report Prepared for the
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FOREWORD

Our vocabulary these days is filled with change-words. Consider "transition," "revolution," "outmoded," "obsolescent," "swift pace of," etc. For example, the commercial airlines underwent a transition from piston to jet which accomplished a mild revolution in transportation and made the DC-3 outmoded and most other conventional aircraft obsolescent as they were left behind by the swift pace of change. This language is so familiar that the sentence sounds as if the writer attempted to put all the current clichés into one basket--which he did.

Editors and critics to the contrary, clichés have a place. They tell us, many times, the state of an art, the state of a culture. There are only so many change-words and, because they have to be used so much, that is why they sound like clichés. If there is any one thing that can be said for this time in our culture it is that we live primarily in, on and by change. The principal cause of this change is the continuing (and accelerating) scientific-technological revolution. The language is hard put to describe it.

As I have said elsewhere, American education has, for about a century, been exceptionally resistant to technological change when compared with other sectors of our society.

Within the last decade and increasingly within the last five years, this resistance is seen to be crumbling or to be overwhelmed. Opinion is divided only as to the degree of involvement of the American educational system in the general scientific-technological revolution. A case can be made that the revolution is still potential or just beginning; another case can be made that it is well underway. In any case, no knowledgeable person thinks that the educational revolution will go away, although there may be those who would wish it.

A technological revolution is only partly related to hardware, electronics and power from the atom, solid rocket fuel or solar batteries. Perhaps the most important parts of any sweeping technological change are the new forms or organization, the new processes, the new systems of management and control that are created to deal with the new hardware, systems and products.

The Technological Development Project has, as its main objective, an assessment of the technological revolution now engaging or about to engage the subculture in our society that is American education. One great unit of the American educational system (and not thought of very often as such) is the textbook industry. It has been apparent for some time that the textbook industry--its organization and composition, the

way it does business and creates its products as well as the very products themselves--is in a state of rapid transition. The directions of this transition are by no means clear.

To explore this problem, we went to M. Frank Redding, then of the American Textbook Publishers Institute, and asked him to reflect on this revolution within the textbook industry and to make a statement as to its meaning for American education. Later, we asked Roger Smith of Publishers' Weekly to furnish us with some statistics which have not received general circulation within the educational community that we could fit in with Mr. Redding's manuscript. The result is this Occasional Paper.

We present it to the educational community as an excellent statement of the situation. It has, as have many of our other papers, been written from a point of view. We make no apologies for this. All necessary information is properly labeled and the reader may draw his own conclusions.

If there is a criticism of this paper from the point of view of the Technological Development Project, it is that the entry of publishers into the so-called newer media field--films, television, tapes, programed instruction--is slighted. This is, to a small degree, due to the preferences of Mr. Redding;

however, the main cause is that the situation is in high flux and no one has taken a clear reading across the terrain of this diverse industry. This is a research problem of some size and, if the Technological Development Project is continued beyond its present terminal date, it is a problem we intend to investigate.

In the meantime, there is more than enough meat for the thoughtful educator and layman to chew on in the present paper. The implications of the changes cited and the problems that are being raised in the textbook publishing industry have immediate consequences in the education of American children and adults. For, as Dale and Corey pointed out long ago, most of what children do in school is a consequence of the materials of instruction provided them.

James D. Finn
Los Angeles
January 1963

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The Revolution in the Textbook Publishing Industry

In a recent issue of the New York Times, Mr. Fred Hechinger compares the present position of the textbook publishing industry with that of the aircraft industry during the period of changeover from piston engines to jet. Problematic as that situation may have been, the aircraft manufacturers had at least one significant advantage over today's publishers: they knew what changes were needed and could thus dedicate their abilities to solving the technical problems involved. The publisher, on the other hand, faces not only the problems of changing technology in production, but the even more troublesome dilemma of determining what those products should be. For the consumer himself is in a quandary. What will the schools require of instructional materials within the next decade--or within the next five years, for that matter? Will the basal textbook continue to reign supreme? Or will paperbacks, "cluster" systems, programed materials, electronic devices, and other departures from the traditional textbook emerge as the dominant pattern in teaching materials? The answers to these questions are clearly critical for the book publisher.

Within the past few years, a variety of forces have coincided to produce the so-called "revolution" in publishing. For an industry that traditionally has prided itself on its sound conservatism, almost any one of these major changes would have produced far-reaching effects. As it is, the total impact of this broadcast change has resulted in a veritable upheaval. No amount of gainsaying can change the basic fact: the textbook publishing industry has been seriously altered from its former self of even five years back. Whether this Cinderella has found herself a prince--or simply settled for the glass slipper--will have to be seen. The fact remains, a change has taken place. And more change is on the way.

Surely no single group of American businessmen is so sensitive to the tides and currents of the school curriculum as the educational publishers. There is no particular mystery about this: a publisher who consistently fails to meet present curriculum needs, or to predict with a fair degree of accuracy future needs, simply will not remain a publisher. Where the schools go, there go the publishers.[1] And of late, the schools

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[1] There exists a strange, recurring myth that the textbook publisher <u>creates</u> the curriculum. Were the impossibility of a publisher's doing so not demonstrably clear, we might here devote time to laying this tired fallacy to rest!

have been <u>going</u> a great many places. The fruits of new educational research abound; nation-wide studies, Federally underwritten or foundation-supported, are breaking new ground; public pressure for change, improvement, progress is heavy; teachers are busy re-training; revered methodology is under attack; popular writers (some of whom appear not to have been inside a school since their own formal education ended) are flooding their editors with manuscripts for books, articles, feature stories on the need for change within the schools; a cold wind blows in from the Kremlin and the entire teaching profession is made to shiver. Education is in ferment. And with it, educational publishing.

<u>Half-way House</u>

Before we attempt to assess this ferment, it may be well for us to pause a moment to survey the terrain of the book publishing industry. For it is a field filled with paradox, a "half-way house between art and business," in the words of one publisher. In our case, we will restrict our explorations to that half-way house between curriculum and commerce, the textbook publishing industry.

First, a historic overview of the industry in terms of sales. (See Table I, next page.) As the table indicates, textbook publishing is healthy and growing, though

TABLE I

PUBLISHERS' TOTAL TEXTBOOK & STANDARDIZED TEST SALES

YEAR	THOUSANDS OF DOLLARS: TEXTBOOKS: ELEM	H S	ELHI	COLLEGE	TOTAL	STAND. TESTS	TOTAL TEXTS & TESTS	PERCENT OF TOTAL TEXTBOOK SALES: ELEM	H S	ELHI	COLL	TOTAL
1939	SEPARATE DATA WERE NOT COLLECTED		37,800	13,400	51,200	DATA WERE NOT COL-LEC-TED				73.8	26.2	100
1940			36,600	13,900	50,500					72.5	27.5	100
1941			39,800	14,300	54,100					73.6	26.4	100
1942			41,300	16,300	57,600					71.7	28.3	100
1943			43,300	20,000	63,300					68.4	31.6	100
1944			48,500	17,300	65,800					73.7	26.3	100
1945	29,000	23,700	52,700	20,800	73,500	2,020	75,520	39.5	32.2	71.7	28.3	100
1946	34,800	25,300	60,100	47,150	107,250	2,580	109,830	32.4	23.6	56.0	44.0	100
1947	42,700	28,950	71,650	53,150	124,800	3,050	127,850	34.2	23.2	57.4	42.6	100
1948	48,750	31,200	79,950	51,400	131,350	3,470	134,820	37.1	23.8	60.9	39.1	100
1949	54,900	32,050	86,950	52,350	139,300	3,520	142,820	39.4	23.0	62.4	37.6	100
1950	61,100	33,200	94,300	49,100	143,400	3,660	147,060	42.6	23.2	65.8	34.2	100
1951	66,150	32,200	98,350	43,200	141,550	4,000	145,550	46.7	22.8	69.5	30.5	100
1952	76,300	34,100	110,400	41,900	152,300	4,350	156,650	50.1	22.4	72.5	27.5	100
1953	84,500	38,600	123,100	44,800	167,900	4,860	172,760	50.3	23.0	73.3	26.7	100
1954	89,800	41,300	131,100	49,600	180,700	5,420	186,120	49.7	22.8	72.5	27.5	100
1955	97,200	45,800	143,000	58,700	201,700	5,970	207,670	48.2	22.7	70.9	29.1	100
1956	105,600	52,600	158,200	67,000	225,200	6,400	231,600	46.9	23.3	70.2	29.8	100
1957	115,100	61,300	176,400	74,900	251,300	7,220	258,520	45.8	24.4	70.2	29.8	100
1958	126,000	69,800	195,800	83,700	279,500	8,410	287,910	45.1	25.0	70.1	29.9	100
1959	138,300	78,000	216,300	94,300	310,600	10,570	321,170	44.5	25.1	69.7	30.4	100
1960	147,200	83,300	230,500	106,350	336,850	11,600	348,450	43.7	24.7	68.4	31.6	100
1961	155,600	96,300	251,900	121,700	373,600	11,490	385,090	41.6	25.8	67.4	32.6	100

(Reprinted from the Annual Survey of the Textbook Publishing Industry. Data in this represent 94% of industry dollar sales.)

the fact remains that its entire annual sales volume is matched each month by the volumes of the giant U. S. corrporations. Not, then, very big business as American busineess goes. It can be argued, however, that its significance in terms of impact on our country's intellectual growth is well beyond any dollar-and-cents standard. Typically, the Ammerican adult (age 21) has devoted the major share of his readinng to textbooks, whether he wills or not. For all too many Ammericans, the only serious book reading they have ever accomplisheed is that of required textbooks served up to them during theiir elementary and high school education. Viewed in this perspppective, the educational book publishing industry assumes a signiificance well out of proportion to its profit-and-loss stattements. Culturally, textbooks may be the single most significantt influence in the country today.

Who are the men who make these books? Historiically, publishers have been small businessmen who either inhercited their companies (and who often bore their founder's namees!), or scholarly-minded individuals who have been willing to dedicate themselves to the rigors of educational publishing for profits that were often less than inviting. As we shall see, this is no longer necessarily the case. Still, textbook publishing has not so been altered--at least, at present--

that much the same type of individual is likely to be numbered among top management in today's companies. Along with these rather serious-minded captains of the textbook industry go their editors. These latter often come from the ranks of education, itself, and are, in general, surprisingly dedicated scholars. It is upon these two unique individuals--the textbook publisher and his editor--that the responsibility for the printed word in the classroom rests. Happily, these two individuals are generally both sensitive to this responsibility and capable of executing it.

A desk away, in most publishing houses, sits the so-called 'trade' editor. Once clearly distinguished as the man responsible for deciding upon what books would be available to the trade (i.e., novels, poetic offerings, current best sellers, etc.), he now finds himself in a curious limbo between demands of the book-buying public and the book-buying schools. The first high school English teacher who decided the Catcher in the Rye ought to be read by his 40 seniors in American literature, blurred a line between "trade" and "text" which has yet to be re-defined.

While not especially significant to the book-buyer, this relatively recent marriage of function between the editorial departments in publishing houses is resulting in what might almost

be called a revolution in book publishing today. Once it would have been possible to describe two kinds of book publishing in relatively accurate terms. Presently, however, the fact is that most book publishers have become--willing, or not--educational publishers. For the schools have not stood still in their demands for fresh, vital, informative books. Nor are they likely to do so in the future. A first-rate contemporary biography, a major offering by a modern historian, or an important work of current fiction will find its place in today's classroom just as surely as a basal reading series. Thus, all of book publishing (with some few exceptions) may now be classified as <u>educational</u>. The same could not have been said even ten years ago.

Traditionally, some 100 textbook publishers were responsible for the needs of the school market. These houses were chiefly distinguished by the availability of their financial resources. Specifically, these were book publishers capable of investing as much as a million dollars in a basal series before realizing even one dollar in sales. The editorial requirements, the need for pre-testing materials in the classroom, the prolonged deliberations of the adoption system--all meant that only a publisher with considerable financial underwriting could make books for the educational market. When one

considers the readers and critics of the textbook (teachers, pupils, school administrators, school boards, parents, lay organizations, professional groups) it is immediately apparent that publishing a textbook involves infinite care and (thus) infinite time. Only the most stable of publishers could afford either the editorial talent or the sales force to get a book adopted. Thus, textbook publishing as an industry has traditionally been solid, conservative, and cautious.

Steeped as it was in its Puritan beginnings, educational publishing prided itself on its scholarly offerings, at all levels, as well as on its resistance to unproven change. In this respect, of course, it reflected accurately the traditional school market. To have done otherwise would have been unthinkable to the textbook publisher--as well as financially catastrophic.

From the hornbook to the vocabulary-controlled reading series, educational book publishing represented one of the soundest, if not one of the most exciting, American business endeavors. That changes have now occurred in this venerable industry may be attributed more to the schools than to the publishers. For as long as educators were content with the curriculum based on tradition and founded in precedent, book publishers were willing to serve these ends. Generally,

unconventional editors with exciting new ideas were asked to yield to their more conservative colleagues. Nor should this be especially surprising. Given a free hand--and a free budget!--a brillant young editor might very well create such exciting new books that there were barely warehouses enough to hold them. And hold them.

But something was to happen to American education and, thus, to its handmaiden, educational publishing. That something was Soviet Russia.

The New Monies

A not-surprising effect of the post-Sputnik panic within education was an early expression of dissatisfaction with textbooks. (A teacher under attack understandably prefers company!) As the schools hastened to mount a giant program of introspection and analysis, it became clear that instructional materials were not to escape their appointment with the analyst's couch. Publishers, as sensitive to their products' weaknesses as they are proud of their strengths, commenced re-tooling projects aimed at wedding excellence to practicality. As this hope-filled process moved forward, it became increasingly clear that a good deal of working capital was going to be required. Money--in sums larger than publishers were accustomed to contemplate--held the key to the successful launching of

the new educational projects and programs. For most companies, privately-held and conservatively financed, the prospect of underwriting costly new programs appeared to be a simple impossibility. Others, with the pressure for change mounting, decided on a drastic course of action: they would offer themselves up for public ownership. If the public proved interested (and that remained to be seen!), the resultant money would provide the launching-pad for brave and timely new projects.

And the public proved to be interested, indeed. Early offerings came on the market, were snapped up, and more demanded. Wall Street reacted in a rush. Textbook shares were soon referred to as "glamor" stocks; brokers vied with one another for representation; publishing appeared to be "big business." A pattern of mergers appeared, in which suitable "marriages" between and among complementary companies were arranged. Quite naturally, stocks in these newly-formed giants moved briskly. New monies, new alliances, new opportunities--book publishing was healthy and flourishing.

Table II lists the major publishing firms that issued stock for purchase by the public during the period 1959-1962. Table III presents the data on major mergers in the book publishing industry, 1958-1962.

TABLE II[2]

Major Firms in Book Publishing Whose Stock "Went Public" for the First Time, 1959-62

Name of Firm	Date	Type*
American Heritage Publishing Company	October '61	OC
Ginn and Company	November '60	NYSE
Grosset and Dunlap	May '61	OC
Harcourt, Brace (now Harcourt, Brace & World)	August '60	NYSE
D.C. Heath and Company	May '61	OC
Richard D. Irwin, Inc.	August '61	OC
Pocket Books	January '61	OC
Random House	October '59	NYSE
Row, Peterson (now Harper & Row)	February '60	OC
Science Research Associates	November '61	OC
Scott, Foresman	November '60	OC
Webster Publishing Company	May '61	OC
Western Publishing Company	August '60	OC
John Wiley & Sons	May '62	OC

* NYSE: N.Y. Stock Exchange
OC: Over-the-counter

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[2]Table prepared by Roger Smith of Publishers' Weekly.

TABLE III[3]

Major Mergers in Book Publishing, 1958-62

FIRM	ACQUISITION	DATE*
American Book Company	McCormick-Mathers Publishing Company	December '61
Appleton-Century-Crofts	Landsberger Medical Books	December '60
Crowell-Collier	Brentano's Book Stores	March '62
	Grade Teacher Magazine	April '62
	Free Press of Glencoe (Illinois)	January '61
	Macmillan Company	Nov '59-Dec '60
	Scientific Materials, Inc.	April '62
Encyclopaedia Britannica	F.E. Compton Company	January '61
Farrar, Straus & Cudahy (now Farrar, Straus & Company)	Noonday Press	July '60
Ginn & Company	Personnel Press	December '61
Grolier, Inc.	Spencer Press and its subsidiary, American Peoples Press	August '61
Harcourt, Brace & Company and World Book Company merged to form Harcourt, Brace & World		September '60
Harcourt, Brace & World	Rupert Hart-Davis, Ltd. (London)	December '61
Harper & Brothers and Row, Peterson merged to form Harper & Row		May '62
Holt bought Rinehart & Company and the John C. Winston Company to form Holt, Rinehart & Winston		December '59
Holt, Rinehart & Winston	Mentzer Bush & Company	February '61
Houghton Mifflin and the American branch of Penguin Books exchanged minority stock interests		January '62
J.B. Lippincott	A.J. Holman Company	July '61
McCall Corporation	Saturday Review	January '61
McGraw-Hill	F.W. Dodge Corporation	November '60
Meredith Publishing Company	Appleton-Century-Crofts	October '60
	Duell, Sloane & Pearce	March '61
	Lyons & Carnahan	February '61

Parents Institute	Baker & Taylor (second largest book jobber)	December '58
Random House	Beginner Books Alfred A. Knopf, Inc. Pantheon Books L. W. Singer Company	July '60 April '60 May '61 October '60
Howard W. Sams, Inc.	Bobbs-Merrill	November '58
Time, Inc.	Silver Burdett	March '62
Times-Mirror Company (Los Angeles)	New American Library	March '60
Webster Publishing Company	Gelles-Widmer Company	February '62
Western Publishing Company bought Golden Book properties from Simon and Schuster to form Golden Press (50% owned with Affiliated Publishers, a division of Pocket Books.)		November '58
Western Publishing Company	Capitol Publishing Company	January '61
Western Publishing Company	Odyssey Press	March '61
John Wiley & Sons	Interscience Publishers	January '62
World Publishing Company	Meridian Books	April '60

* Dates refer to first announcement of merger or acquisition. Dates for the Crowell-Collier and Macmillan merger indicate the span of time during which Crowell-Collier acquired a majority interest in Macmillan through stock purchases in the over-the-counter market.

[3]Table prepared by Roger Smith of Publishers' Weekly.

Thus, the first hurdle had been passed. The resources needed for immense new undertakings were at hand. One thing was certain: if publishers had not themselves been able to solve the problem of supporting essential projects and programs, other agencies (Government? Foundations? School Systems?) would surely have taken on the task. And neither the publisher nor the thoughtful citizen wished to see this happen.

Perhaps this is the place for a word concerning the American system of textbook publishing--a system which is uniquely our own and which incidentally, has provided American schools and colleges with the finest textbooks in the world.

The key phrase is <u>free enterprise</u>; the key force is <u>competition</u>. Almost without exception, countries the world around produce their textbooks within one or another governmental agency--generally a "ministry of education." Such a system provides government with two distinct advantages: first, the government can claim "economy" in its monopolistic operation of the book program; and second (and more to the point!), the government is thus able to exercise careful control over the content of the books--a distinct advantage for that ruling body which desires to maintain careful control over the minds of its youth. For the economically deprived nation, government publishing may be a necessity; for the nation that is well-off, however,

the system should and does come into question. Fortunately for our own country, textbooks have been remarkably free of government control. Teachers and selection committees have traditionally been able to choose from among a wide range of instructional materials those which they found most useful, most suited to their own educational requirements. As a hundred or more textbook companies compete for school adoptions, it should surprise no one that America's textbooks are superior to any in the world. (This statement requires no documentation. Simply ask the opinion of any teacher abroad--on this side of the Iron Curtain, of course.)

It does seem fortunate, then, that it was possible to find within our free-enterprise system a solution to book publishing's near-crisis. The question is: What happens now that the dollar-hurdle has been met?

The first step, logically, has been a vast increase in publishing's research and development staffs. Top editors have been set free from the minutiae of desk-work and office routines in order to concentrate on assembling talent, for manning new projects, and for creating and giving shape to future projects. The lines to education have been strengthened and improved. Editors--ever a peripatetic breed--have intensified their travel schedules so rigorously that one of

them recently remarked, "I live in the air!" Not one important educational conference goes unattended by scores of editors and publishing executives. Educators express a new need, sight a coming trend, look in a new direction--and educational publishers are busy weighing, evaluating, planning. Brief cases bulge with new manuscripts; with the latest findings from the world of educational research; with papers, pamphlets, books--the intensified output of America's educational revolution.

Many publishers have by now created imposing new staffs of researchers into the so-called "new media" of education. Here are explored the dimensions of educational television, tape-teaching and language labs, films and filmstrips, programed instruction and teaching machines, the "classroom-of-the-future" concepts, and so on. Upon the shoulders of these educational research experts is the responsibility for anticipating the methodological course of classroom instruction for the foreseeable future. Where the schools go, there must go the publishers![4]

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[4]Editor's note: This single paragraph needs expansion into another study which, it is hoped, will be done when the current commitments of the Technological Development Project are completed. There is a veritable second revolution in the publishing industry involving the so-called "new media" which Redding and Smith could not explore in this paper devoted to the vast changes in conventional publishing. J.D.F.

The Foundation Controversy

Editorial staffs these days are spending time on another kind of project--one which has engendered hot debate within book publishing, itself. Under the sponsorship of various foundations (including the Federal Government's own National Science Foundation), entire courses in various of the high school subject areas have been, are, and will be appearing. Generally developed at a cost of millions of dollars--and often providing for the re-training of teachers--such courses are broad in scope and, it is predicted, major in impact. (In fact, no one is yet able to say whether these projects will succeed where success is critical: with the classroom teacher.)[5]

Perhaps book publishers are an unduly sensitive lot. Or perhaps they simply suffer from "over-identification with product." In either case, they were both startled and offended to learn (occasionally by implication, but more often

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[5] Editor's note: For a complete description of national curriculum projects which are creating materials see Current Curriculum Studies in Academic Subjects by Dorothy M. Fraser, National Education Association, Washington, D.C. There is so much activity in this field at the present time that it is difficult to cite usable statistics. A cursory glance at the NEA publication reveals that of all the projects listed, at least the following number are producing materials such as referred to by Mr. Redding: science, 8; mathematics, 8; modern foreign languages, 5. J.D.F.

fiatly and directly) that their books--all of them!--were simply inadequate to the new teaching tasks of the schools. The raison d'être for the creation of the new courses was, simply, that nothing good enough existed. Thus, scholars must be assembled; research programs mounted; millions of dollars spent--all to do a job which educational publishers (and education itself, by the way) had somehow failed to do. It seems natural enough that some hurt feelings resulted.

From the first, Government and foundations made it clear that the fruits of these labors would, eventually, come to publishing--either through being placed in Public Domain (and thus given freely to all), or by being offered up for competitive bids by the publishers. Once the new materials had been conceived, created, tested, and revised, their sponsors were apparently quite willing to place their babies in the hands of commerce.

And here a critical debate ensued. It can be argued, of course, that so long as these materials came to schools and classrooms in the traditional manner of textbooks (i.e., offered for sale by publishers' representatives) the safeguards of the American publishing process were in place. Presumably these sponsored creatures would have to compete with those offerings of other publishers which had come into being through

a more normal process of birth. Selection committees would still be privileged to choose from among a wide variety of published offerings. Where was the problem?

The problem, came the answer, lies at the very heart of the publishing process. For if a publisher is to be a publisher, he must retain final authority in the creating and developing of his product. To take over a "finished" project, bring it out as a book, and sell it to the schools reduces the function of the publishing house to that of a printer and distributor. That revered phrase "editorial integrity" comes under fire. The venerable tradition which insists that a publisher's name on his book is his hallmark of quality is placed in jeopardy. At least so some publishers argue. Others disagree.

There is a consensus on one point, however. It is clear that when "courses" developed by foundations or Government carry with them funds for subsidizing the retraining of teachers on a mass scale, a new problem is created for educational publishing. For this to be seen clearly, it must be remembered that a standard definition of a textbook is simply "a course of study in print." That is, the function of the textbook author is to so shape and structure the basic content of a subject area as to give it beginning, middle,

and end--in short, prepare a course. Traditionally, then, the variety of textbooks available in a subject at a given grade-level has existed because it was understood that some teachers preferred a course organized one way, others preferred it another. Such preference generally grew out of the differences in background and training (especially training) among teachers. So varied are these differences that eight, ten, or twelve text offerings may exist for one course at one grade-level.

Now, something new has been added. Many thousands of teachers are being trained in the conduct of one kind of course, one point of view, one methodology, one set of materials. Over a period of years, then, we may conceivably expect to see one course in a given discipline. (Did someone say "brainwashing"? The word has been used--and in precisely this context!)

Never before in American education has it been possible for a publisher to create a course of study, develop the materials for it, and offer mass-training for the teaching profession in course conduct. It still isn't! Even with its handsome new sources from stock flotation, commercial publishing simply cannot afford an investment of this proportion. The millions of dollars required to underwrite wide professional re-training can be envisioned only in terms of giant foundation

budgets or through expenditure of Government (i.e., public) funds.

Aside from the philosophic implications of this unprecedented development in American education, many publishers foresee certain quite real threats to established competition within the textbook industry. As it is, published offerings to the schools are rich and diverse chiefly because a wide variety of opinion concerning content and method exists within the teaching profession. This framework of diversity stands as a challenge to the publisher: he must somehow make books with sufficient intrinsic merit to capture the imagination of large segments of the educational market--and, incidentally, unseat his competitors' offerings at the same time. In the absence of single, unified, pre-determined set of teaching goals, considerable editorial genius is required to conceive and produce a 'best-seller' among textbooks. Yet this competitive hazard is accepted--even welcomed--among textbook publishers because it offers a challenge that can be understood and even (with luck!) overcome. If the editor is alert to present educational needs; if the authors have something important to say--and say it well; if the book is attractive, well-made, and realistically priced; then, the publisher may hope for a substantial sale and a reasonable return.

These are the ground-rules, simply stated, that have governed educational publishing. But note: Basic to the whole system is the existence of an educational market with many and varied points-of-view on book content. Substitute for this a kind of academic single-mindedness and the whole structure collapses.

And it is here that serious questions are presently being raised concerning foundation and Government underwriting of teacher training and re-training. For if teachers in critical subject areas are to be indoctrinated with one point of view in teaching one kind of course with one set of materials, diversity is at an end. One is reminded of those visiting Russian educators who condemned the American system of textbook publishing as "wasteful" because there were so many books available for teaching the same course. "In Russia," one of them remarked, "we provide only one book for each course: the best book." The implication here is obvious. And are we in America also to provide only the best book for courses in science, foreign languages, and the social studies? The question gives the publisher pause--even as it must concern the citizen.

The Paper-Bound Dilemma

In terms of long-range product planning, publishers are presently busy trying to out-guess each other on how the

books-of-the-future will be served up to the consumer. Specifically, will they wear cloth or appear in paper? For an industry that has never been terribly sure of itself ("Will it be Principia Mathematica or Mickey Spillane this year?"), the foggy prospect is unsettling. Once again, the schools are themselves unsure of just what it is they want in their printed materials. And only the most sanguine among publishers would venture a sure-thing prediction.

It is true that paperback books are lower in price than hardbound. Schools, compelled by economic necessity, are inevitably drawn to "bargains" when purchases are to be made. Thus, the paperback has found little difficulty in being welcomed within academic walls where previously it was seen only as a stranger. A serious question goes unanswered, however. Will the schools find their new guest suitable? On the answer to this depends a very sizeable publishing investment.

In violation of its own traditions, today's paperback is often the first-rate offering of a serious author. (It has been observed that a kind of reverse Gresham's Law operates in the paperback field: the good titles are driving out the bad!) While neither clothbound publishing nor paperbound publishing are without their hazards, the growing

markets for the paperbound book in colleges and high schools would seem to augur well for the future of the soft-cover book. There is a catch here, however. If paperbacks should be found to fail where they are strongest (i.e., as money-savers), the schools could conceivably become disenchanted and move them out in a rush. To date, no one is quite certain whether books bound in paper represent a genuine saving to the school system, or whether their lower acquisition cost is in fact an inviting avenue to later and larger book expenditures.[6]

The paperback problem is compounded by the lack of information most people have regarding the economics of this kind of publishing. Taken as a whole, the differences within the paperback industry are as complex and diverse as the differences between clothbound and paperbound publishing. In a very real sense, there is a vast difference between a "quality" paperback and what has been called a "subway Shakespeare." The former requires editorial, production, and merchandising techniques not unlike those of the traditional hard-cover book; the latter is often loosely edited, is "slapped

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[6]The state of Texas is currently studying this very problem, using in-classroom tests of the same book bound both in cloth and in paper.

into print" on inferior paper, and is frequently distributed in job-lots through magazine outlets.

For many book-buyers, the difference between a fifty-cent and a dollar and fifty-cent paperbound book is just not apparent. What is worse, far too many book-buyers (educators among them!) incline to believe that, say a college textbook costing five dollars could be priced at seventy-five cents if only the publisher were willing to bind it in paper.

Recent figures on paperback sales are presented in Tables IV-VIII. The year 1956 was selected as the starting year since at that time the latest of the "paperback revolutions," which was begun in 1954 by the so-called "quality" lines like Anchor and Vintage, was gaining momentum.

TABLE IV[7]

Textbook Paperback Sales to Elementary Schools (grades K-8)

YEAR	DOLLAR VOLUME	UNITS
1956	$5,160,000	13,760,000
1957	6,260,000	16,260,000
1958	6,675,000	15,705,000
1959	8,255,000	18,550,000
1960	8,530,000	17,590,000
1961	9,845,000	19,690,000

[7]Table prepared by Roger Smith of Publishers' Weekly.

TABLE V[8]

Textbook Paperback Sales to Secondary Schools
(grades 9-12)

YEAR	DOLLAR VOLUME	UNITS
1956	$1,315,000	1,595,000
1957	1,455,000	1,745,000
1958	1,825,000	1,930,000
1959	2,360,000	2,270,000
1960	3,070,000	2,925,000
1961	3,980,000	4,020,000

TABLE VI[9]

Textbook Paperback Sales to Colleges
(grades 13 - up)

YEAR	DOLLAR VOLUME	UNITS
1956	$2,410,000	2,365,000
1957	2,810,000	2,650,000
1958	3,515,000	3,225,000
1959	4,440,000	3,860,000
1960	6,190,000	4,990,000
1961	9,185,000	6,855,000

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8 and 9Tables prepared by Roger Smith of Publishers' Weekly.

TABLE VII[10]

Higher Priced Paperback Sales for the Trade Market[11]

YEAR	DOLLAR VOLUME	UNITS
1956	$3,712,000	7,700,000
1957	4,336,000	6,400,000
1958	5,525,000	8,000,000
1959	7,046,000	9,700,000
1960	9,585,000	16,600,000
1961	15,738,000	25,900,000

TABLE VIII[12]

Mass Market (wholesale) Paperback Sales[13]

YEAR	DOLLAR VOLUME	UNITS
1956	$46,867,000	245,600,000
1957	47,753,000	233,000,000
1958	54,085,000	251,600,000
1959	67,061,000	285,900,000
1960	71,163,000	280,000,000
1961	81,175,000	278,700,000

[10]Table prepared by Roger Smith of Publishers' Weekly.

[11]There is some risk in differentiating "trade" and "wholesaled" paperbacks solely in terms of price, since the price gap between the two types is by now practically indistinguishable. Selling at $1.65, the paperback Rise and Fall of the Third Reich is a "wholesaled" paperback, while an esoteric philosophical tome from Anchor or Meridian may be going for only 95 cents or $1.25. R.S.

[12]See footnote #10.

[13]See footnote #11.

Without here tiring the reader with a recital of the economics of book publishing, it must be plainly stated that much of the "overhead" in the making of a book consists in payments to authors, to editors, to designers and production people; in the costs of paper, printing, plate-making; in commissions for sales representatives and discounts to book dealers. In short, the kind of cover imposed upon a book generally is minor in pricing. The thousands of low-cost paperbacks seen on shelves and racks in drug stores, bus stations, and stationers' shops generally represent re-prints --works re-born from a publisher's backlist (the original overhead long since taken care of through clothbound sales); standard literary works from the past (upon which no authors' royalties now need to be paid); or works rescued from out-of-print bookstores. Their overhead is either minimal or non-existent; their editing is cursory at best; their ink-and-paper qualities are inferior. It is not surprising that their price is low.

Imagine, for a moment, that an established technical publisher has decided to bring out a major book in theoretical nuclear physics. (Since this is a fairly weighty subject, the chances are good that it will be a fairly weighty book.) His author is an outstanding scientist, presently serving on one

of the nation's distinguished faculties. The project is in the hands of a top editor, who has already had the manuscript "read" by a number of people prominent in the field. The book, because of its highly technical contents, abounds in charts, graphs, line-drawings, and other artwork of the most detailed and complex sort. In all, two years will be required before the book's appearance. An expensive project? Yes. Nor does it require a publishing "expert" to see immediately that the market for the product is extremely small. How many prospective readers are there, after all, who will be interested in acquiring this book? Perhaps only a few thousand in the entire country. If the publisher is to realize any profit at all on his investment, he is of necessity going to set a premium price on this offering. Let's say he prices it at ten dollars. Will he, then, offer a paperback edition at eight dollars? At seven dollars? Probably not. And for good reason: His customer will not wish to spend that much money for a book bound in paper. In fact, the customer does not <u>want</u> this book in a paper edition! He will be adding this volume to his reference library where it will be used for many years. He plans to read it, to refer to it, not once but many times. The more durable the binding, the better! And thus, no paper cover for our book.

The foregoing intends primarily to demonstrate one point: The cost of a book goes well beyond the kind of cover it wears. As an aside, it must further be noted that the reader's intended use of the book has a good deal of bearing on how it is bound. (It is the school, for example, which presently dictates manufacturing standards to the publisher. State departments of education specify exactly how textbooks shall be made and determine the number of years of in-classroom use a book shall be expected to provide.)

On the other hand, the schools will certainly be using more paperbacks in the years ahead than they have heretofore. For one thing, it is possible to rush a paperback into print in a hurry. The growing need for a rapid flow of up-to-date information into the classroom can keep presses running around-the-clock. The accelerating change in materials and methods will surely result in an increased flow of paper-bound "experimental" editions to the schools. There they will be tested in the classroom; revised and up-dated; and finally made available in durable editions. And finally, pupils will themselves be acquiring and reading books in greater numbers than ever before. High schools in all parts of the country have already begun installing student book-shops where imposing arrays of books in inexpensive editions beckon to teachers

and young scholars, alike. Their success has been impressive.

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From the publisher's viewpoint, it is imperative that the schools study their book needs carefully and announce their requirements with certainty. Many hundreds of thousands of dollars may otherwise be wasted, along with an incalculable dissipation of talent. For the schools so to do, it is essential that educators acquire at least a working knowledge of publishing procedures and potentials. Actually, the educational publishing industry is capable of providing the schools printed materials of an almost breath-taking range and scope. In asking for a more precise definition of need, publishers are by no means shirking their prime responsibility for anticipating the school market with an ever-new offering of attractive, useful, and scholarly books. The problem for the publisher presently arises from the confusion of statements on means and goals.

A long familiarity with the printed word enables teachers to speak with authority on the strengths and weaknesses of books. Further, the close relationships established over the years between educators and educational publishers have built a bridge of communications between the two groups

that affords a maximum exchange of information. What is now needed is a reaffirmation of the place of the book in teaching, as well as a series of essentially constructive proposals from the schools to the publishers which will help shape patterns of the books of the future. Whether these books are to be large or small, bound in paper or cloth, issued singly or in series, colorful or austerely black-and-white, programed or traditional, singular in purpose or designed for a variety of uses, made to stand alone or created to be used in conjunction with other teaching aids--all these answers must come from the schools.

For there will be books in the school of the future. That much seems certain. But how much--or how little--these works will resemble the books we have known is a matter for the schools to decide. Such decisions are never easy. This one is both difficult and imperative.

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